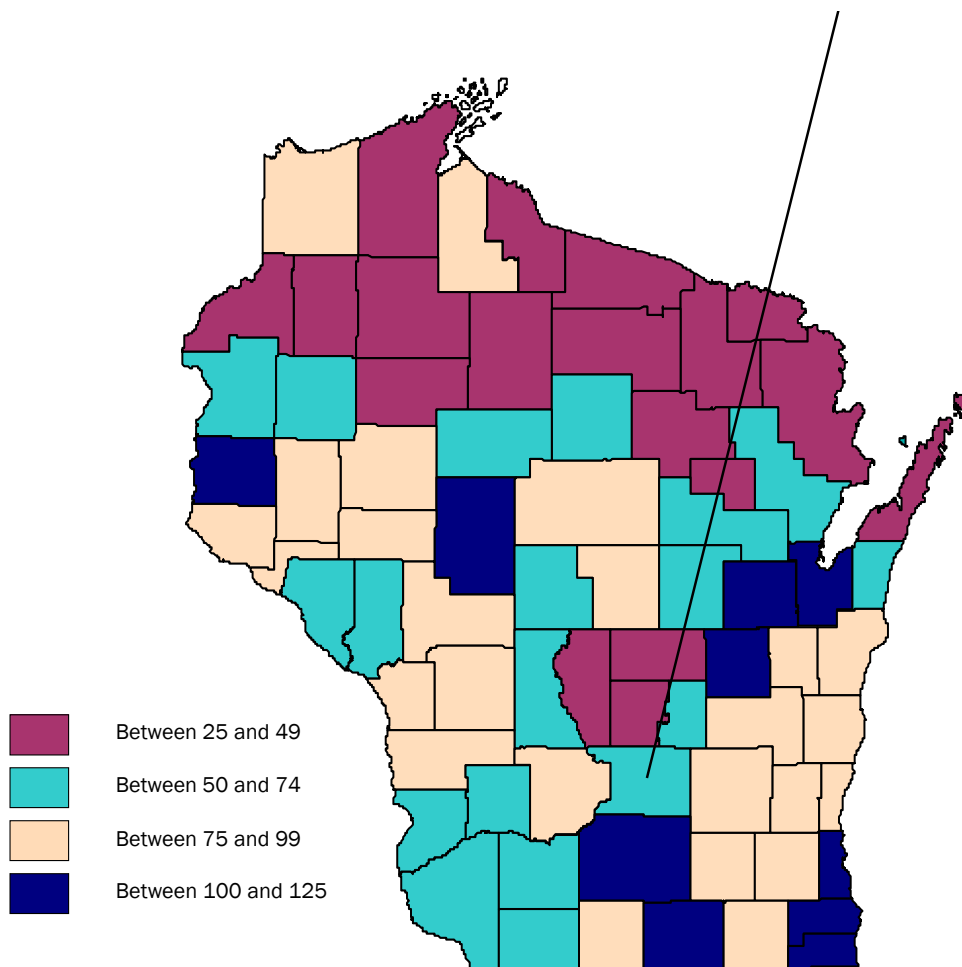


Columbia County Workforce Profile



The number of residents aged 25-29 years for every
100 residents aged 60-64 years in year 2025



Source: Wisconsin Department of Administration, Demographic Services Center and the U.S. Bureau of Census.

For comparison, it is projected that there will be 90 residents aged 25-29 for every 100 residents aged 60-64 in Wisconsin in 2025. Nationally, it is projected that there will be 101 residents aged 25-29 for every 100 residents aged 60-64. In 2003, Wisconsin had 146 residents aged 25-29 for every 100 aged 60-64.



County Population

Population trends affect the supply of workers, the ability to attract employers and the demand for goods and services. Columbia County added roughly 2,128 people or 4.1 percent to its population between the April 2000 Census and the January 2004 population estimates. Together, the Town of Lodi and the City of Co-

Total Population

	April 2000 Census	Jan. 1, 2004 estimate	Numeric change	Percent change
United States	281,421,906	292,287,454	10,865,548	3.9%
Wisconsin	5,363,715	5,532,955	169,240	3.2%
Columbia County	52,468	54,596	2,128	4.1%
Largest Municipalities				
Portage, City	9,728	9,966	238	2.4%
Columbus, City*	4,443	4,704	261	5.9%
Lodi, Town	2,791	3,084	293	10.5%
Lodi, City	2,882	2,949	67	2.3%
Pacific, Town	2,518	2,651	133	5.3%
Poynette, Village	2,266	2,461	195	8.6%
Dekorra, Town	2,350	2,406	56	2.4%
Wisconsin Dells, City*	2,293	2,345	52	2.3%
Pardeeville, Village	1,982	2,051	69	3.5%
West Point, Town	1,634	1,750	116	7.1%

*Columbia County portion only.

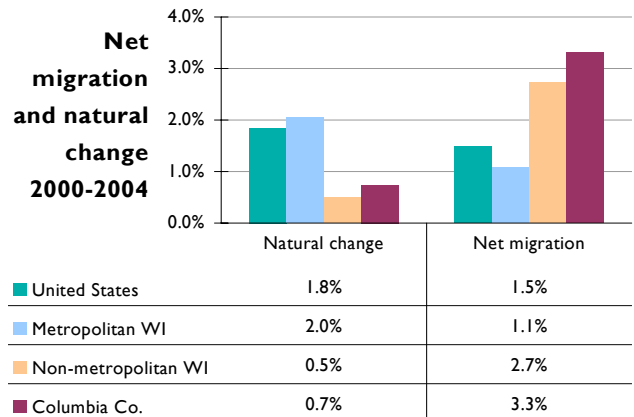
Source: Wis. Dept. of Administration, Demographic Services and U. S. Census Bureau

lumbus accounted for 14 percent of the county's population and 26 percent of its population growth.

The character of the county's population growth merits closer examination. The rate of natural change ((births minus deaths) ÷ original population) was faster in the county than in non-metropolitan Wisconsin, but slower than in metropolitan Wisconsin or nationally. It was net migration (people moving in minus people moving out) that allowed Columbia County to grow so quickly. Between 2005 and 2030, Wisconsin demographers project that natural increase will be 48 percent less than between 2000 and 2005.

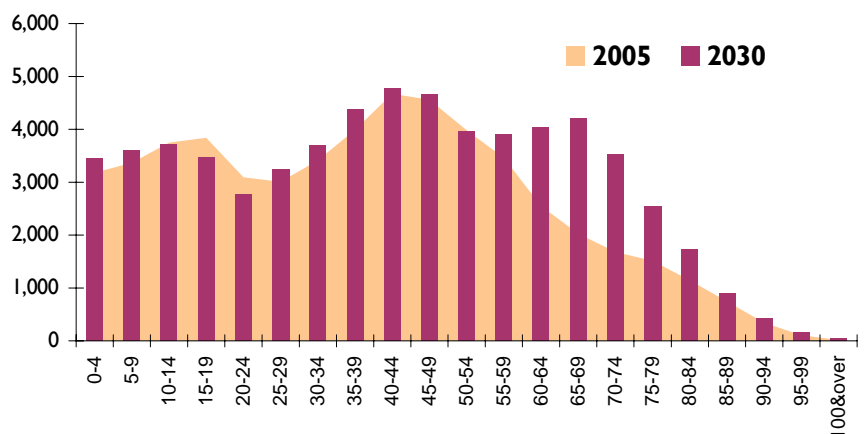
The graph to the right contrasts the age demographics of 2005 (the lighter area) with the projections for 2030 (the darker bars). Every age group under 60 years old

is projected to be a smaller share of the population in 2030 than in 2005. The 60 years-and-over group will grow from 10,122 people (19% of total population) to 17,572 people (28% of total population). The overall population will grow about 16 percent while the 60-and-over population grows 74 percent. In the year 2005, Columbia County will have 118 residents aged 25 to 29 for every 100 residents aged 60 to 64; by 2030 that number will fall to 80. In 2005, projections suggest that 10,955 county residents will be aged 5 to 19 (approximately school ages). By 2030, this number will shrink nearly 2 percent to 10,790. Together these trends could generate pressure to change funding or spending for social services or education. Such changes could affect the number of qualified workers available.



Source: WI Dept. of Admin., Demographic Services and U. S. Census Bureau

Population by Age Groups in Columbia County



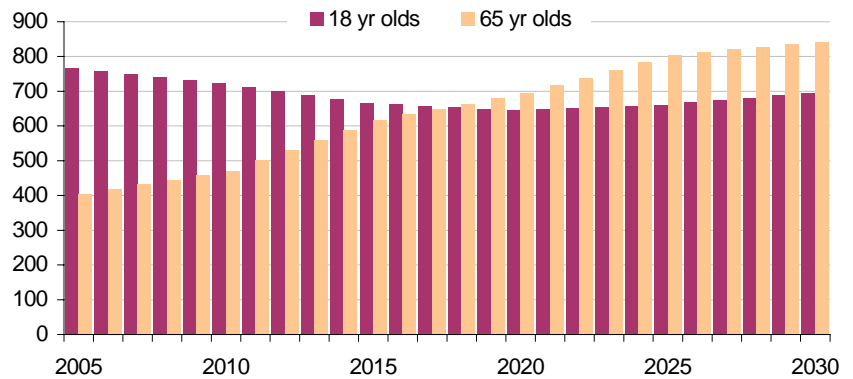
Source: WI Dept. of Administration, Demographic Services

Future Population and Labor Supply

The graph to the right shows how many people will turn 18 each year and how many people will turn 65 each year. Some workers will start their careers later than the age of 18 and some will leave the labor market before reaching 65, but these can be rough proxies for people entering the labor market and people leaving the labor market. Between 2005 and 2030, the number of residents turning 18 each year falls slightly from 734 to 694; meanwhile the number of residents turning 65 each year grows from 389 to 842. This has serious implications for any establishment whose customer base or employee pool includes significant numbers of baby boomers.

The baby boom (1946 to 1964) was dominated by white, non-Hispanic children. Subsequent increases in national birth rates relied heavily on Hispanic and non-white parents. The graph below shows that even compared to homogeneous Wisconsin, Columbia County lacks the robust diversity that can help drive labor force growth. For reasons beyond the scope of this profile, the labor force participation rate (the frequency with which people work and look for work) tends to be higher among Hispanic and non-white populations than it is among white non-Hispanic populations.

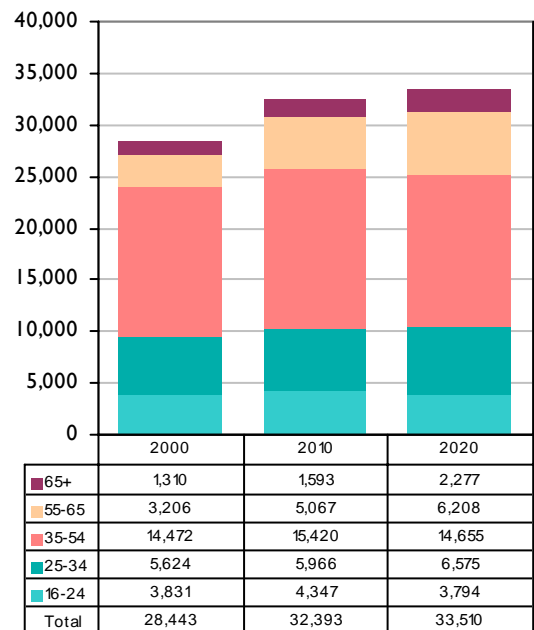
Convergence of 18 & 65 year old population in Columbia County



Source: WI Dept. of Administration, Demographic Services

Below, the Labor Force Projections by Age graph is based on current participation in Columbia County with adjustments in each age group based on national projections. The county's older cohorts are more white and non-Hispanic, so their participation rates may be below national levels. From 1990 to 2000, the labor force grew 11 percent. Between 2000 and 2010, it will grow 14 percent. In the following decade (2010 to 2020) it will grow 3 percent. Even changes much milder than predicted could constrain job growth.

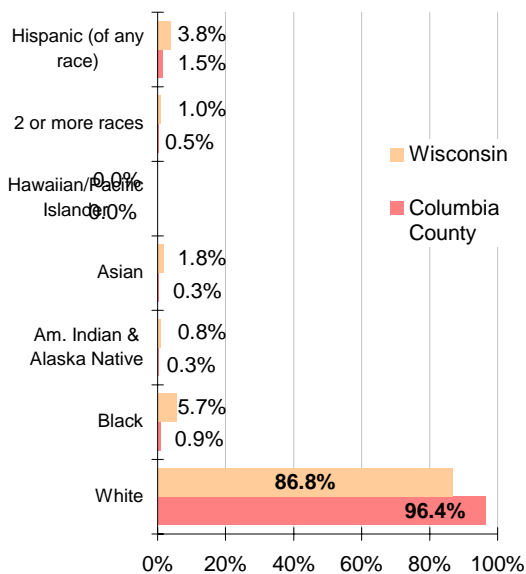
Columbia County Labor Force Projections by Age



Decade change	10.6%	13.9%	3.4%
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Source: DWD, Office of Economic Advisors, August 2004

Race and ethnic distribution

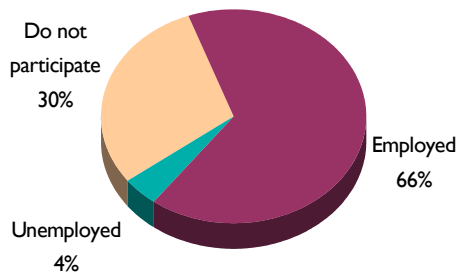


Source: U.S. Census Population Characteristics Estimates, 2002

Current Labor Force

The participation rate is the share of population 16 years and over that is employed or unemployed. In 2003, the national participation rate was 66.3 percent and Wisconsin's was 72.9 percent. In Columbia County, the participation rate of 70 percent indicates that 30 percent of the population 16-and-older did not participate in the labor force by working or seeking

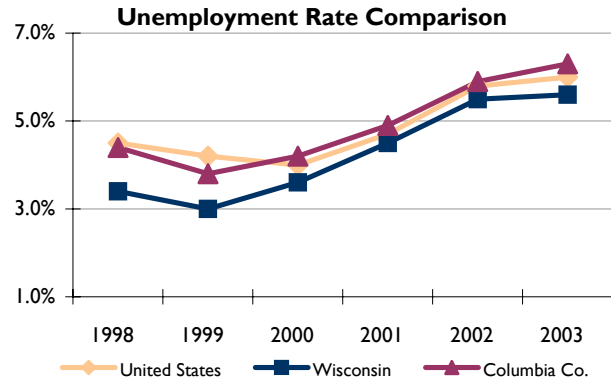
Labor force participation in Columbia County



Source: DWD, Office of Economic Advisors, July 2004

work. The group that does not participate usually includes students, retirees and at-home parents. Demographic analysis on pages 1-2 suggests that retirees will become a more prominent cohort in years to come and that the participation rates will fall as baby boomers retire.

The unemployment rate graph below shows that Sauk County's rates began to rise in 2000, before the nation's or the state's. The fourth quarter of 2003 saw more encouraging rates than the first three. The first two quarters of 2004 were rather uneven.



Columbia County Civilian Labor Force Data

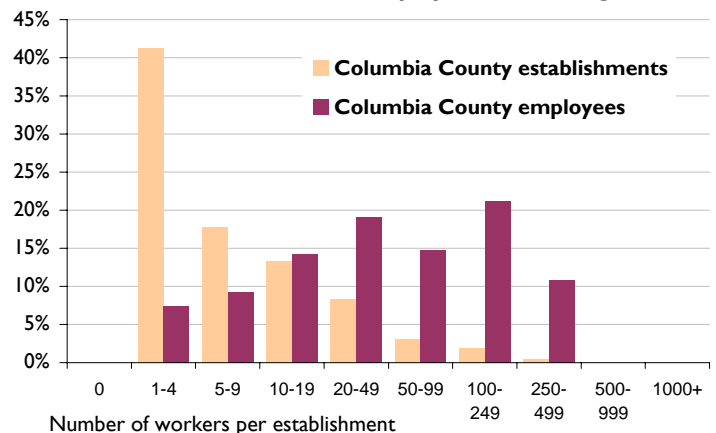
	1998	1999	2000	2001	2002	2003
Labor Force	27,358	26,249	27,431	28,448	28,296	28,610
Employed	26,152	25,258	26,270	27,043	26,628	26,808
Unemployed	1,206	991	1,161	1,405	1,668	1,802
Unemployment Rate	4.4%	3.8%	4.2%	4.9%	5.9%	6.3%

Source: WI DWD, Bur. of Workforce Information, Local Area Unemployment Statistics, 2003

Establishments by Size

Roughly 1,554 establishments reported operations in Columbia County and 1,124 of them reported 19 or fewer employees. The lighter set of bars in the graph shows that the three size classes under 19 employees (1-4, 5-9 and 10-19) together account for 72 percent of the reporting establishments. Meanwhile, less than 14 percent of establishments belong in the four size classes between 20 employees and 499 employees. This contrasts sharply with the darker set of bars, which shows that less than 31 percent of the jobs were with establishments in the 1-4, 5-9 and 10-19 employee size classes, and about 66 percent of jobs were with establishments in the four size classes between 20 employees and 499 employees.

Share of establishments & employees in size range in



Source: DWD, Bureau of Workforce Information, Table 221, July 2004

Industries & employers by size

Listed in the upper table on this page, Columbia County's 10 largest industry groups provided roughly 45 percent of the jobs in the county. Food manufacturing employment figures have been volatile in recent years, but the drop between March 2003 and March 2004 and the drop between the 2003 annual average and the 2002 annual average remain concerning.

Listed in the lower table on this page, Columbia County's top 10 employers accounted for roughly 19 percent of the jobs in the county. As the people in prime tax-paying years become a smaller share of the population, reliance on public funding (including Medicare or Social Security) could limit employment growth for some establishments.

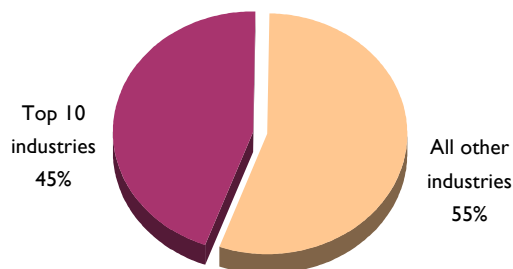
Top 10 Industries in Columbia County

Industry	March 2004		Numeric Employment Change	
	Establishments	Employees	2003-2004	1999-2004
Educational services	16	1,865	27	129
Food services & drinking places	111	1,356	25	87
Plastics & rubber products manufacturing	suppressed	suppressed	not avail.	not avail.
Executive, legislative, & gen government	27	815	-7	90
Specialty trade contractors	122	746	68	59
Food manufacturing	12	684	-114	-109
Hospitals	suppressed	suppressed	not avail.	not avail.
Ambulatory health care services	54	590	-87	125
Nursing & residential care facilities	11	579	-46	-143
Food & beverage stores	18	522	-27	-27

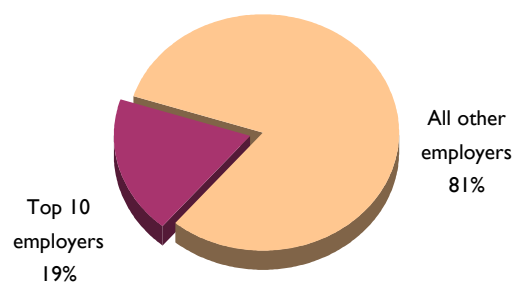
Top 10 Employers in Columbia County

Establishment	Product or Service	Size (Dec. 2003)
Divine Savior Hospital & Nursing	Offices of physicians, except mental health	500-999 employees
County of Columbia	Executive and legislative offices, combined	500-999 employees
Portage Public School	Elementary and secondary schools	250-499 employees
Associated Milk Producers Inc.	Cheese manufacturing	250-499 employees
Penda Corp.	All other plastics product manufacturing	250-499 employees
Wal-Mart Associates Inc.	Discount department stores	250-499 employees
Department of Corrections	Correctional institutions	250-499 employees
Cardinal Glass Industries Inc.	Flat glass manufacturing	250-499 employees
School District of Wisconsin Dells	Elementary and secondary schools	250-499 employees
School District of Lodi	Elementary and secondary schools	100-249 employees

Share of jobs in top 10 industries in Columbia County



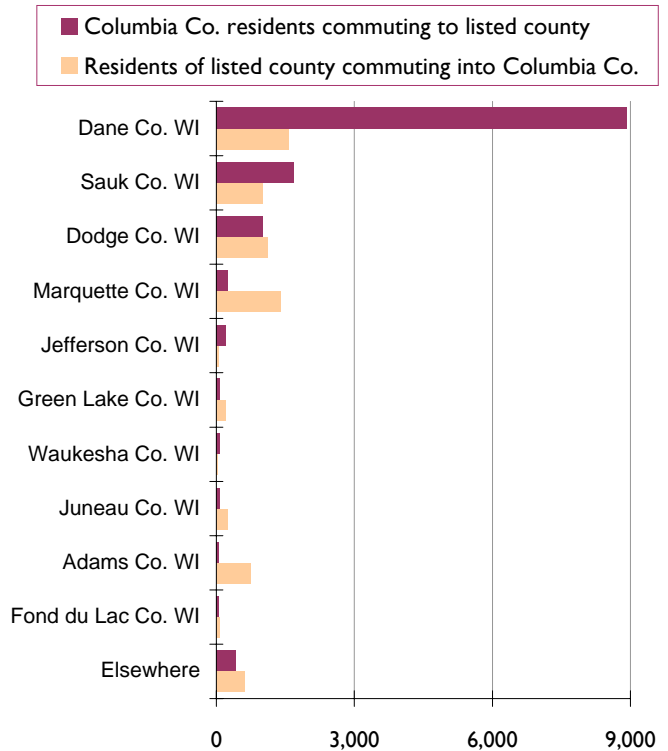
Share of Columbia County jobs with top 10 employers



Source: DWD, Bureau of Workforce Information, Quarterly Census of Employment and Wages

Commuting

The 2000 Census reported that approximately 12,828 Columbia County residents worked outside the county (about 48 percent of working residents). At the same time, roughly 7,078 workers from other counties commuted to jobs in Columbia County (filling about 33 percent of the jobs located in the county). Crossing a county line does not necessarily mean a longer commute than finding a comparable job in the county. Roughly 58 percent of Columbia County's working residents traveled less than 25 minutes for work. The darker set of bars in the graph to the right shows that about 70 percent of the workers leaving Columbia County go to Dane County, where the unemployment rate is usually among the lowest in the state and wages are among the highest in the area. The concentration of professional and technical jobs might convince some of these commuters to live in Dane County if housing cost differentials weren't so significant. Similarly, Columbia County draws workers from Marquette and Adams counties where wages tend to be lower, the unemployment rate tends to be higher and the number of jobs is lower.



Source: U.S. Census 2000, Special tabulations: Worker Flow Files

Key occupations & wages

The table to the right lists some of the occupations with the greatest estimated employment in the Columbia County area. The range bracketed by the 25th percentile wage and the 75th percentile wage might be called a typical wage range because a quarter of the occupation's workers earn less, a quarter earn more and about half earn a wage somewhere in the range.

Those occupations requiring less training and education tend to see lower wages and narrower wage ranges (e.g. cashiers and waiters/waitresses). These factors contribute to turnover. Many well-paid technical or professional positions congregate around groups of economic hubs such as headquarters and major operational centers. Less metropolitan areas tend to see less white collar work and more general labor, as the table indicates.

Occupation title	Hourly Wages			
	Mean	Percentile		
		25 th	50 th	75 th
Comb. food prep.& serving workers (fast food)	\$7.13	\$6.23	\$7.11	\$8.09
Cashiers	\$8.13	\$7.14	\$8.03	\$9.08
Team assemblers	\$11.67	\$9.88	\$11.10	\$13.49
Retail salespersons	\$10.37	\$7.50	\$8.80	\$11.62
Laborers & freight, stock, & material movers, hand	\$10.83	\$9.61	\$10.75	\$12.41
Waiters & waitresses	\$6.51	\$5.87	\$6.35	\$6.86
Office clerks, general	\$10.51	\$8.42	\$10.11	\$12.34
Carpenters	\$16.43	\$14.27	\$16.09	\$18.24
Industrial truck & tractor operators	\$11.70	\$10.09	\$11.21	\$13.09
Truck drivers, heavy & tractor-trailer	\$16.83	\$13.62	\$16.97	\$19.81
Bookkeeping, accounting, & auditing clerks	\$12.44	\$10.02	\$11.67	\$14.44
Janitors & cleaners, except maids & hskpg. cleaners	\$9.51	\$7.73	\$9.25	\$11.00
Secretaries, except legal, medical, & executive	\$11.83	\$10.25	\$11.86	\$13.40
Registered nurses	\$23.32	\$19.99	\$23.06	\$26.37
Middle school teachers, except special & voc. ed.	-	-	-	-
1st-line suprvs/mgrs. of office & admin. support	\$18.86	\$15.29	\$17.95	\$21.97
Nursing aides, orderlies, & attendants	\$9.71	\$8.43	\$9.35	\$10.82
General & operations managers	\$33.52	\$21.46	\$31.59	\$39.60
Sec. school teachers, except special & voc. ed.	-	-	-	-
Maids & hskpg. cleaners	\$8.35	\$7.41	\$8.14	\$9.22

Columbia County is part of an area which includes Columbia, Green, Iowa and Sauk counties.

Source: DWD, Office of Economic Advisors, special tabulation using EDS and OES 2003

Employment and Wages

Overall, Columbia County employers reported paying roughly 81% of the statewide all-industries average wage. The table to the right shows that manufacturing's average annual wage was higher than any other sector's. The table below shows that manufacturing employed more people, on average, than any other sector in the year 2003. Between 2002 and 2003, manufacturing shed more jobs than any other sector and saw faster growth in average wage. The rise in average wages could be partially attributable to layoffs hitting lower-paid manufacturing workers harder than higher-paid ones. Shedding lower-paid workers would not, however, explain total manufacturing payroll increasing between 2002 and 2003.

With the second-highest employment figure and the third-highest total payroll figure, the trade, transportation, and utilities sector gained more jobs in 2003 than any other sector. The average annual wage for the sector (\$24,292) masks differences between wages in its

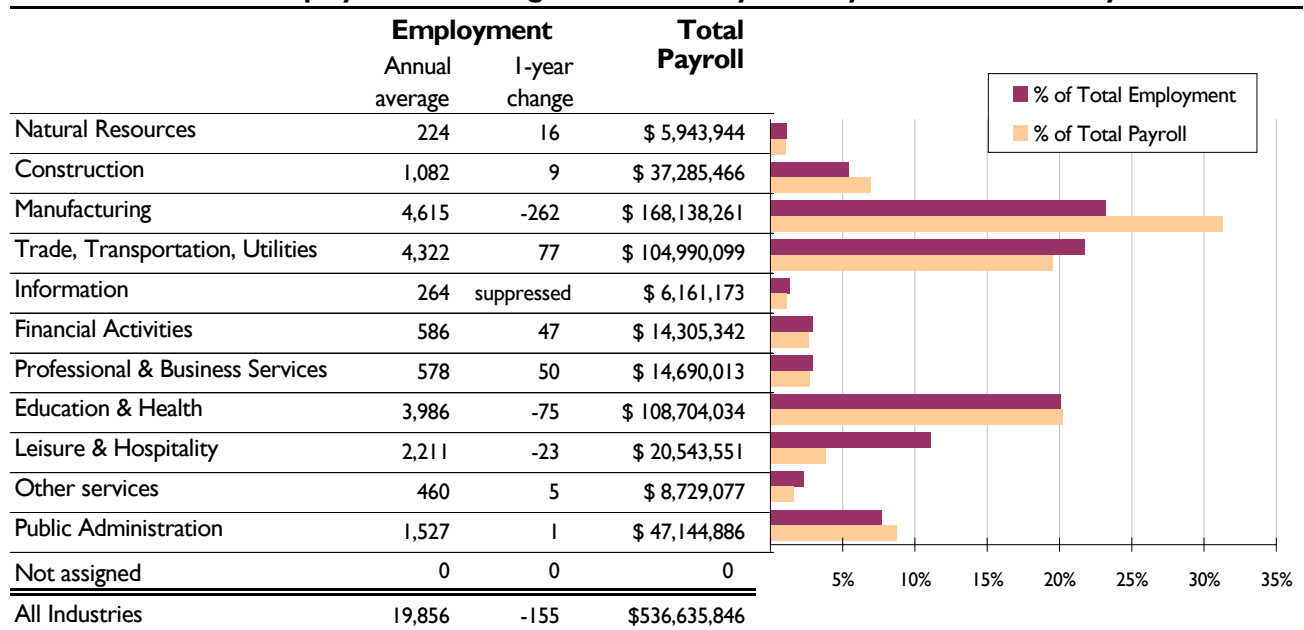
Average Annual Wage by Industry Division in 2003

	Average Annual Wage Wisconsin	Average Annual Wage Columbia County	Percent of Wisconsin	1-year % change
All Industries	\$ 33,423	\$ 27,026	80.9%	4.6%
Natural resources	\$ 25,723	\$ 26,535	103.2%	2.7%
Construction	\$ 40,228	\$ 34,460	85.7%	5.6%
Manufacturing	\$ 42,013	\$ 36,433	86.7%	8.2%
Trade, Transportation, Utilities	\$ 28,896	\$ 24,292	84.1%	2.4%
Information	\$ 39,175	\$ 23,338	59.6%	Not avail.
Financial activities	\$ 42,946	\$ 24,412	56.8%	4.1%
Professional & Business Services	\$ 38,076	\$ 25,415	66.7%	-0.6%
Education & Health	\$ 35,045	\$ 27,271	77.8%	5.3%
Leisure & Hospitality	\$ 12,002	\$ 9,292	77.4%	0.9%
Other services	\$ 19,710	\$ 18,976	96.3%	-1.7%
Public Administration	\$ 35,689	\$ 30,874	86.5%	2.9%

Source: WI DWD, Bureau of Workforce Information, Quarterly Census of Employment & Wages

component segments: utilities (\$63,206), wholesale trade (\$29,916), transportation and warehousing (\$28,883) and retail trade (\$19,962). About 65 percent of the sector's jobs are in the retail trade segment. The health care and social assistance segment of the education and health sector pays nearly \$2,000 a year less than the educational services segment, but demographic analysis on pages 1-2 suggests that health care demand will grow faster.

2003 Employment and Wage Distribution by Industry in Columbia County



Source: WI DWD, Bureau of Workforce Information, Quarterly Census Employment and Wages, June 2004

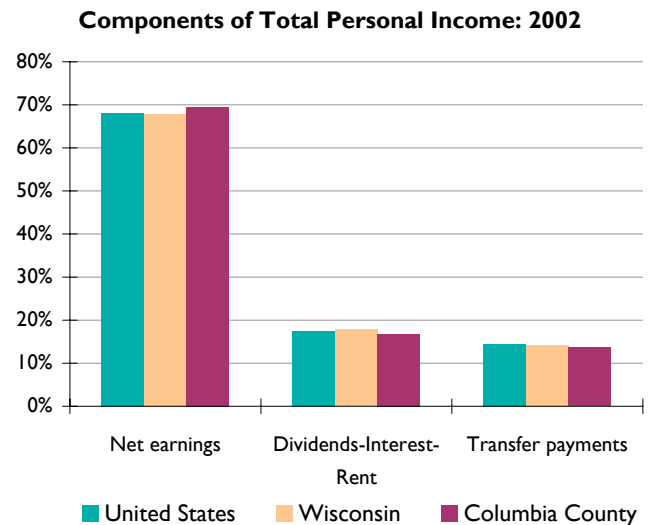
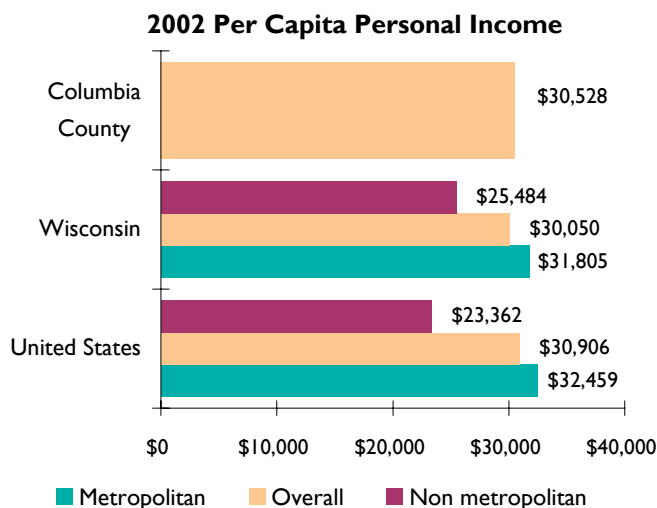
Per Capita Personal Income

In 2002, Columbia County's per capita personal income (\$30,528) remained above non-metropolitan Wisconsin's PCPI (\$25,484) and the national non-metropolitan PCPI (\$23,362). Between 1997 and 2002, Columbia County's PCPI growth (22.9%) roughly matched Wisconsin's (22.6%) and the nation's (22.0%). Columbia County's PCPI has been 18 to 20 percent above non-metropolitan Wisconsin's since 1995. In 2001, inflation outpaced Wisconsin's PCPI growth and the nation's PCPI growth.

Growth in PCPI relates to demographic shifts discussed on pages 1-2. As a greater share of the population enters retirement, more residents rely on transfer payments (such as Social Security) and fewer have net earnings (typically associated with employment). Transfer payments are not likely to grow as fast as net earnings. Households with substantial investment income (dividends, interest or rent, including retirement or pension plans) are more likely to consider warmer climates for retirement, so PCPI growth may slow.

	Per Capita Personal Income						Percent Change	
	1997	1998	1999	2000	2001	2002	1 year	5 year
United States	\$25,334	\$26,883	\$27,939	\$29,847	\$30,527	\$30,906	1.2%	22.0%
Wisconsin	\$24,514	\$26,175	\$27,135	\$28,573	\$29,361	\$30,050	2.3%	22.6%
Non-metropolitan WI	\$20,734	\$22,195	\$22,900	\$24,059	\$24,833	\$25,484	2.6%	22.9%
Columbia County	\$24,846	\$26,098	\$27,295	\$28,936	\$29,607	\$30,528	3.1%	22.9%
In current dollars (adjusted to U.S. CPI-U)								
United States	\$28,397	\$29,670	\$30,170	\$31,181	\$31,010	\$30,906	-0.3%	8.8%
Wisconsin	\$27,478	\$28,889	\$29,301	\$29,850	\$29,825	\$30,050	0.8%	9.4%
Non-metropolitan WI	\$23,240	\$24,497	\$24,728	\$25,135	\$25,226	\$25,484	1.0%	9.7%
Columbia County	\$27,849	\$28,803	\$29,474	\$30,230	\$30,075	\$30,528	1.5%	9.6%

Source: U.S. Dept. of Commerce, Bureau of Economic Analysis, May 2004



Source: U.S. Department of Commerce, Bureau of Economic Analysis, Regional Economic Information System, May 2004

The county workforce profiles are produced annually by the Office of Economic Advisors in the Wisconsin Department of Workforce Development. The author of this profile and regional contact for additional labor market information is:

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Madison, WI 53704
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email: Dan.Barroilhet@dwd.state.wi.us

Metropolitan Statistical Area (MSA) - A single county or group of counties that include at least one urbanized area with a minimum population of 50,000. Multiple-county MSAs have a central county or counties, which have a high degree of social and economic integration with the other member counties as measured by commuting data.

Non-metropolitan county - Any county that is not a member of a metropolitan statistical area.

Net Migration - One of two components of population change. It is the net result of individuals who either moved into or out of an area.

Natural Change - One of two components of population change. It is the result of the number of births minus the number of deaths in an area over a period of time. A natural increase indicates there were more births than deaths. A natural decrease indicates there were more deaths than births.

Employed - Persons 16 years of age or older, who worked as paid employees, or worked in their own business, profession or farm, or worked 15 hours or more as unpaid workers in a family-operated enterprise. Includes those temporarily absent from their jobs due to illness, bad weather, vacation, childcare problems, labor dispute, maternity or paternity leave, or other family or personal obligations.

Unemployed - Persons 16 years of age or older with no employment, who were available for work and made efforts to find employment sometime during the previous 4-week period ending with the monthly reference week. Persons who were awaiting recall to a job did not need to look for work to be classified as unemployed.

Labor Force - The sum of the employed and unemployed, whom are at least 16 years of age and older.

Unemployment Rate - The number of unemployed divided by the labor force. It is expressed as a percentage of the labor force.

Labor Force Participation Rate (LFPR) - The labor force divided by the total population aged 16 years and older. It is expressed as a percentage of the population aged 16 years and older.

Suppressed - Data is withheld or suppressed if it does not meet certain criteria. If an industry in a county has fewer than three employers or if a single employer employs 80% or more that industry's total employment in that county then the data are suppressed. These criteria were established to maintain the confidential reporting of payroll and employment by employers.

Total Personal Income - The aggregate income of an area received by all persons from all sources. It is calculated as the sum of wage and salary disbursements (less contributions for government social insurance), supplements to wages and salaries, proprietors' income with inventory valuation and capital consumption adjustments, rental income of persons with capital consumption adjustment, personal dividend income, personal interest income, and personal current transfer receipts that include retirement and veteran's benefits, government paid medical reimbursements, and income maintenance program payments.

Per Capita Personal Income (PCPI) - Total personal income divided by the total population.

Current Dollars - Phrase used to express historical dollar values in terms of their current purchasing power via inflation adjustment.

CPI-U - Consumer Price Index for all urban consumers, the most commonly used measure of inflation in the United States.